

Project Managers' Advisory Group

MINUTES January 22, 2007

Attending:

Bob Giannuzzi	EPMO
Alisa Cutler	EPMO
Jesus Lopez	EPMO
Richard McGee	EPMO
Barbara Swartz	ITS
Charles Richards	ITS
Jim Tulenko	ITS
Todd Russ	ITS
Vicky Kumar	DOT
Cheryl Ritter	DOT
Lucy Cornelius	DPI
Joe Cimbala	DHHS/DMH
Charles Fraley	DHHS/DIRM
Lynn Beck	DHHS/DMH
Deborah Webb	NCIC

Bob Giannuzzi welcomed everyone to the meeting and asked first-time participants to introduce themselves. **Lucy Cornelius** of DPI introduced herself.

Bob called for approval of the December minutes – accepted with one minor correction.

Jesus Lopez informed that within the next few weeks somebody from the prep class will be taking the PMI exam, and he is optimistic that the results would be favorable. Cycle 5 training will start in April. Seat priority will be given to the 31 people (from 8 agencies) on the current waiting list.

Dick McGee presented on Milestones & Key Project Deliverables. The presentation will be posted on the EPMO website.

NCPMI news was covered next. **John McShane** advised that the next Public Sector LIG is scheduled for February 1st. **Vicky Kumar** informed of an upcoming Leadership Training program for senior program managers. The first would be for 3 days the end of February, the next would be 3 days in June, and finally 3 days in September. The cost would be \$1995.00 for 9 days and earns 60 PDUs.

Vicky also advised of a special seminar given by Neal Whitten is slated for March 15. See the NCPMI website for details.

Bob Giannuzzi called for updates from the Task Groups.

- *PM Tools* **Gaye Mays** (absent) reported through **Bob** the group has had demos by SAP and Microsoft and is scheduling one with IBM, the other top vendor. A follow up meeting on SAP with Billy Willis and Mark Paxton was slated for 1/26. **Charles Fraley** reported that the MS Enterprise was video taped and that **Glenn Poplawski** is the person to contact for the tape.

- *Workflow* **Jesus Lopez** reported that he presented at the 1/12 TPG meeting the improvements the group is investigating. The work group will focus on the feedback/recommendations.
- *Methodology* **Alisa Cutler** handed out copies of a draft PPMT Manual Project Status Report and amended workflow process. She said that the manual status report would be a good method of reporting if a project is held in gate review. She state the workflow process update is for status reports to be up to date before gate approval can be completed. She requested feedback on the manual status report be submitted by February 5th so it can be brought to the next PMAG meeting. **Lucy Cornelius** asked that since some registered projects require reporting, whether the manual report template should be used. **Alisa** said that it should. The next task the Methodology Group will be addressing is the project closeout process.
- *Monthly Status Reporting* Besides the aforementioned manual report template, **Gaye** reported (via **Bob**) that a one page executive summary report template is being developed for voluntary usage. Use of the Resource tab is still under investigation.
- *PM Promotion and Education* This team has not met since November and is regrouping with turnover in participants.

Bob Giannuzzi passed out the following information on upcoming teleconferences of interest to the PM Advisory Group.

Organization/website	Contacts	Upcoming Calls
http://www.nascio.org/nascioCommittees/projectManagement	Stephan Jamison 859/514-9148 sjamison@AMRms.com Access 888/272-7337 conference ID 7544292#	<u>February 6 (3:00)</u> Earned Value Analysis
PMO Executive Council http://www.pmo.executiveboard.com/PMOEC/1,3241,,00.html	Register at website	<u>February 13 (12:00)</u> User-Centric Process Change Management
CIO Executive Council http://www.cio.executiveboard.com/	Register at website	<u>February 12 (12:00)</u> Building a Leadership Development Program
Application Executive Council http://www.aec.executiveboard.com/	Register at website	<u>February 8 (11:00)</u> Metrics-Driven Operational Performance Improvement
Infrastructure Executive Council http://www.iec.executiveboard.com/	Register at website	<u>February 15 (11:00)</u> Problem Management Challenges and Strategies
Information Risk	Register at	<u>February 20 (11:00)</u>

Executive Council http://www.irec.executiveboard.com/	website	Technology-Driven Controls III: Drivers of CISO Effectiveness
Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/	Register at website	<u>February 20 (12:00)</u> Increasing EA Responsiveness through Adaptive Architecture Practices

Bob stated that there were no changes to the website to report at this time.

John McShane informed that the upcoming RFP Lab is overbooked and that he is to cut off applications. He informed that the training is on February 6th and that he is in the final stages of selecting participants. He is accepting teams that include business, procurement, PM, and IT personnel. He said the first class is somewhat of an experiment so feedback will be most welcome. He encouraged all present to solicit feedback from those within their agencies who attended the class.

Jim Tulenko advised that his PPM tool team have been looking at changes as mentioned in the status reporting. He said they were also looking at minor configuration changes in the next few weeks. He informed that the next big change would be Microsoft Release available to our user community around March. **Jim** will pursue feedback from those piloting Resource tab functionality.

Bob distributed a document (attached) on Lessons Learned from recently completed projects. Specific recurring lessons were discussed. **Vicky** recommended that the PMAG share continuously collected lessons learned at our monthly meetings.

Bob asked that if anyone would like to deliver a presentation at the next meeting or can recommend one to let him know.

Meeting adjourned at 3:55 PM.

Lessons Learned Documentation

Exhibit A

Project Name Improved Student Access to Services and Optimize Registration Resources (ISASORR) Enhancement	Project Ref. No. ISASORR	Prepared By (print) Tamrah West-Mattis	Preparer's Initials TWM
Customer North Carolina Community College System (NCCCS)	Contact Bruce Humphrey	Contact's Phone 919-807-6991	Date Prepared 9/7/2006

SUMMARY

PROJECT BACKGROUND

The North Carolina Community College System (NCCCS) Computer Information System (CIS) Project was initiated in June 2000 to implement an integrated administrative information system for use by 59 institutions within the North Carolina Community College System. The ISASORR project is an enhancement to the CIS Project that will allow the NCCCS institutions to implement and manage individual blocks and overrides functionality into Colleague. The enhancement has been released to all 58 institutions within NCCCS and is currently being used by Central Piedmont Community College and Wake Technical Community College. These are two of the largest colleges in the system.

LEARNING HIGHLIGHTS

The ISASORR project provided several opportunities for improvement to current ACS and NCCCS processes and procedures. From this project, we have learned the importance of:

- incorporating the ITS procurement process in early planning to account for the time required for approval of IT projects
- granting authority to one project manager for overall management of the project from end-to-end in any instance where an ACS PM and an NCCCS PM are assigned
- assigning a full-time documentation specialist to IT projects
- spending adequate time to build requirements to understand the level of effort required to complete the project prior to setting deadlines
- collaborating with NCCCS resources to ensure knowledge transfer
- building a cohesive project team when remote resources are utilized
- managing and allocating tasks to remote resources effectively
- implementing an effective configuration management process to ensure the smooth flow of code through the SDLC
- operating according to the agreements set forth in the Statement of Work to ensure scope control
- Payment of services rendered or milestones achieved should be managed according to the original milestone plan as identified in the Statement of Work
- encouraging a sense of ownership of tasks assigned in the work breakdown structure as it relates to functional area managers

- resolving teaming issues immediately

RECOMMENDATIONS

After review of the project, the ISASORR project team recommends that each project at ACS and NCCCS consider the following:

- The initial planning phases of a project should always incorporate the time it takes to gain approval from the governing body. In this case, the NCCCS Financial Review Board, ITS, and IT Procurement timelines must be considered and managed accordingly to ensure the project start date is met.
- When a NCCCS Project Management resource is assigned to a project either to manage or co-manage, their attendance should be required in status meetings where the project is discussed throughout the project lifecycle. In this case, this would include Leadership and Project Planning meetings.
- Oftentimes, project end dates are set prior to understanding the full scope and level of effort necessary to complete the project. In these cases, project teams must be careful to reevaluate impacts that a late start, additional requirements, or changes to the plan can have on the initial targets set. This must be analyzed on a case by case basis and documented to show how these impacts affect the original plan.
- The inclusion of a Documentation specialist on the project team is highly recommended for all IT projects.
- Joint Application Development sessions are a best-practice for ensuring all relevant resources are involved in the project. Additionally, participation in design reviews is equally important.
- System Test resource engagement early in the project is recommended to ensure that the testing resources are involved in the requirements, design, and development discussions. This is very helpful in understanding how the system is to function from a user perspective and assists with the development of test scripts. Often times, errors are noted that are really a result of a lack of understanding of the design. Unit test cases can help to mitigate this; however, a clear understanding of the decision points throughout the project is invaluable to the System Test team.
- Knowledge transfer has been a key area on the NCCCS CIS project. All software development projects should include NCCCSO (development and help desk) and college resources to facilitate adequate knowledge transfer and skills enhancement through participation in development activities, code reviews, and status meetings. NCCCS resources must take advantage of all opportunities to interact with key subject matter experts to ensure continued growth and development.
- As the project plan is developed, identification of additional resource that will be participating in later phases of the project i.e. Beta and Pilot should be identified early so that they have an opportunity to participate in the project requirements, design reviews, status meetings, and UAT training and sessions. They are key resources that are valuable during the implementation and post-implementation phases.
- It is extremely important that resources with agreed upon skill levels are assigned to projects. When this is not managed effectively, it negatively impacts the schedule because tasks that are assigned are either reassigned to already loaded resources, or the amount of guidance required lengthens the time estimations and impacts the tasks of the resource providing guidance. This can also have a negative impact on team dynamics causing frustration and burnout.
- It is also important to form a team with resources that work well together and in a team environment.
- Identify training requirements necessary throughout the project to ensure that resources are refreshed on software processes and procedures. Web Advisor training should be provided to development team members who are not familiar with using the interface, as well as compiling and moving the code through the system.
- Upon agreement on the scope of work as outlined in the Statement of Work, all parties should adhere to the agreements made therein. A formal review of the Statement of Work should be required at the start of each project to ensure that all parties are clear on their responsibilities within the scope of the project. Transitions of responsibility should

be noted and reviewed by all parties to ensure smooth transition of duties throughout the project. The objective here is to provide a clear sense of ownership of project responsibilities.

- The payment terms agreed upon in the contract and Statement of Work should be adhered to and not altered without mutual agreement by both parties. There is an impact to the morale of the project team when payment milestones are not met and acceptance not granted as agreed.
- Grouping and assigning tasks within the WBS should be carefully executed where dependencies exist to avoid rework. For example, system testing of components can be redundant if modification to one component impacts another. In this case, modifications to the UI screens in Colleague impacted development on the Web Advisor components as well.
- Resources have noted that estimates for development require additional time allotted for meetings, code reviews, and hours needed to assist other team members. These often are hidden pockets of time that are not accounted for in the project plan, but have great impact on the overall schedule.
- Conducting code reviews are a best-practice in software development. In order to conduct effective code reviews, project team members should have adequate time to review the code prior to code reviews. Additionally, code reviews should not be scheduled during peak development activities.
- Once a project is completed, it is important to recognize the project team formally for a job well done.
- Select a carrier that can provide technical support on their conference call provider was horrendous.
- Incidents that are reported at or during the implementation of an enhancement that impact related components should be analyzed prior to escalating to the project team. ITIL best-practices for Incident Management require a thorough investigation of the incident prior to escalating to a problem. Development resources should not be engaged prior to this investigation. There is impact to cost, time and resource management when incidents result in set up issues, information provided, and user error.
- Continuous improvement to Project Management and SDLC methodologies. In particular, with respect to the SDLC, we should never deviate from how we plan to deliver software during the project without a thorough analysis and rebaseline of the project plan.

Exhibit B

DOT - 511 Traveler Information System Phase II project

The time spent to ensure the Business Requirements and Program Specification document clearly defines the requirements and expectation of the customer is well worth the effort and pays off in the development of the system.

Exhibit C

Dept. of Agriculture and Consumer Services - NC State Fair Electronic Ticketing project

LESSONS LEARNED - What were the positive lessons learned (project strengths) from this effort?

We learned that an electronic ticketing solution can be implemented that will account for better ticket accountability.

We also learned that we can use wireless to communicate to all the gates at the Fairgrounds.

We bought roll tickets as a back up plan in case something did not work as we hoped which proved to be a great investment as we did go back to using the roll tickets when connectivity issues arose as well as the system being too complex for the ticket sellers.

LESSONS LEARNED - What opportunities for improvements (project weaknesses) were learned with this project?

The electronic ticketing system needs to be simple to use. The one we used this year was much too complicated for the ticket sellers.

More redemption booths for online ride books need to be set up through out the Fair with better scanners. The scanners we used were very inexpensive and needed to be set up closely to the APs.

Exhibit D

DOR - Guest Worker Data Warehouse project

LESSONS LEARNED - What were the positive lessons learned (project strengths) from this effort?

Communication was excellent – the project team was aware of the events as they unfolded, as well as issues, risks, etc.

Clear role and responsibility definition is key.

The short cycle time served the team well, enabling resources to focus on immediate deliverables.

LESSONS LEARNED - What opportunities for improvements (project weaknesses) were learned with this project?

Allocate at least 50% more time (based on this example, rather than 80 days, this would have been a 120 day project) for knowledge transfer and assimilation.

Ensure that there is sufficient time for initial business modeling (“As Is”) and a clear understanding of what the “To Be” processes that are anticipated as a result of the implementation.

Exhibit E

OSC – PCI Security Compliance Program project

LESSONS LEARNED - What opportunities for improvements (project weaknesses) were learned with this project?

Account for EPMO approval process in procurement. However, since this procurement was for a service to be delivered and standard RFP rules were followed, don’t believe this approval added value.